

**Amendment to Transportation Corridor
Agencies'**

REGIONAL COUNCIL ATTACHMENT #4.1.4
Thursday, Feb. 6, 2003

REPORT

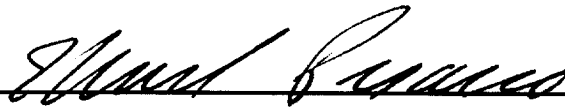
DATE: January 23, 2003

TO: Administration Committee / Regional Council

FROM: Charles Keynejad, Senior Regional Planner
(213) 236-1915 or keynejad@scag.ca.gov

SUBJECT: Amendment to the Transportation Corridor Agencies' MOUs
Incorporating Bus Occupancy into Annual AVO Report

EXECUTIVE DIRECTOR'S APPROVAL:



RECOMMENDED ACTION:

Approve the proposed amendment to the April 5, 2001 MOU, incorporating the bus occupancy rate into the annual Average Vehicle Occupancy report for each of the Foothill/Eastern Transportation Corridor and the San Joaquin Hills Transportation Corridor and recommend its approval to the Regional Council.

BACKGROUND:

The Transportation Corridor Agencies (TCA) and the Orange County Transportation Authority (OCTA) have been exploring ways to reduce congestion and to increase the average vehicle occupancy (AVO) by encouraging bus use of the toll roads in Orange County. Additionally, school bus operators have expressed interest in using the toll roads to a greater extent in exchange for toll reductions or waivers. The bus use of toll roads not only reduces congestion and improves mobility, it also reduces emissions and improves air quality in the region.

In 1991, SCAG entered into an MOU with the TCA which requires submittal of an annual AVO report to SCAG. The current MOUs do not provide for counting of bus passengers.

To incorporate the bus occupancy into the Annual Average AVO Report, the current Memorandum of Understandings (April 5, 2001 MOUs) for the Foothill/Eastern Transportation Corridor and the San Joaquin Hills Transportation Corridor should be amended.

Section 2.14 (Definition) of the current MOUs between SCAG and TCA defines bus as a type of vehicle that can travel on the subject toll roads and its passengers can be counted for reporting in the annual AVO. To monitor and estimate the annual AVO, TCA is

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using a Caltrans developed methodology that does not include estimation of bus passengers in its procedures.

To count bus occupancy in the annual AVO monitoring and report, TCA has recommended a procedure, a copy is attached. The recommended procedure is consistent with professional practice, including the OCTA method in estimating the bus passengers and the school bus operators.

The proposed amendment to each MOU is through a letter agreement to be signed by both agencies and reflecting the bus occupancy method when calculating the toll road's annual AVO performance. Copies of the letters of understanding for transportation corridors are attached for SCAG's President signature.

FISCAL IMPACT

Approval of this amendment will have no additional fiscal impact on SCAG's budget.

Doc # 80674



Recommended Procedure to Incorporate Bus Occupancy in TCA's Annual Monitoring Reports

- Goal:** Monitor Average Vehicle Occupancy (AVO) on Orange County toll roads to fulfill the SCAG/TCA Pricing Policy MOU requirements.
- Objective:** Insure that AVO monitoring accurately accounts for the actual toll road usage, including passenger cars, trucks, and buses.
- Task:** Incorporate bus AVO into total AVO monitoring on the Orange County's public toll roads.

Discussion:

The 2001 SCAG/TCA Pricing Policy MOU requires TCA to use Caltrans monitoring procedures for measuring AVO on the toll roads. Caltrans procedures explicitly instruct traffic counters to exclude buses that pass through monitoring checkpoints. Thus, passenger occupancy on buses are not counted toward total AVO. These procedures result in an AVO measurement that does not accurately take into account actual usage of the toll roads.

Bus AVO can easily be incorporated into total AVO measurements by means of an adjustment factor. Although traffic counters cannot determine bus occupancy during the monitoring period, actual occupancy can be provided by the bus operator, or estimated using conservative methods.

Recommended Procedure:

- 1) Count all buses (transit, school, charter and other) that pass through monitoring check points during the annual monitoring period.
- 2) Establish occupancy of each bus counted by means of one of the following:
 - ξ Actual passenger counts provided by the operator (e.g. OCTA, school bus operator)
 - ξ Estimated ridership based on annual ridership survey
 - ξ A conservative default assumption of 9 passengers per bus in the event that current ridership records are not available.
3. Document the amount of bus traffic counted during the monitoring period and overall bus AVO in the annual AVO Report. Identify bus occupancy established through passenger counts and ridership surveys. Identify occupancy estimated using default assumptions.
4. Calculate total facility AVO, including both passenger vehicle AVO counted by means of Caltrans procedures, and bus AVO calculated according to this recommended bus AVO adjustment procedure.

San Joaquin Hills
Corridor Agency

Chairwoman:
Linda Lindholm
Laguna Niguel



TRANSPORTATION CORRIDOR AGENCIES

Foothill/Eastern
Corridor Agency

Chairman:
Scott Diehl
San Clemente

December 2, 2002

President Hal Bernson
C/o Mark Pisano, Executive Director
Southern California Association of Governments
818 Seventh Street, 12th Floor
Los Angeles, CA 90017

Subject: Letter of Understanding regarding the Monitoring Provisions of the "Amended and Restated Memorandum of Understanding By and Between Southern California Association of Governments and San Joaquin Hills Transportation Corridor Agency Regarding Implementation of Toll Facility Pricing Policy"

Dear President Bernson:

The Southern California Association of Governments (SCAG) and Transportation Corridor Agencies (TCA) executed the "Amended and Restated Memorandum of Understanding By and Between Southern California Association of Governments and San Joaquin Hills Transportation Corridor Agency Regarding Implementation of Toll Facility Pricing Policy" on April 5, 2001. This MOU prescribes a procedure for monitoring Average Vehicle Occupancy (AVO) that relies on Caltrans procedures that do not fully reflect the actual occupancy of all vehicles using the toll roads, such as buses.

It is the expressed intent of SCAG and TCA that the Toll Facility Pricing Policy MOU reflect bus occupancy when calculating the toll roads' annual AVO performance. Therefore, this letter sets forth SCAG's and TCA's mutual agreement that all references to AVO monitoring shall be understood to include AVO associated with cars, trucks, and buses.

Walter D. Kreutzen, Chief Executive Officer

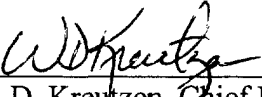
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President Bernson
December 2, 2002
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This letter of understanding will take effect immediately upon endorsement below by both SCAG and TCA, and will remain in effect until revoked in writing by both parties.

Accepted By:



W. D. Kreutzen, Chief Executive Officer
Transportation Corridor Agencies

12-4-02
Date

President Hal Bernson
Southern California Association of Governments

Date

Attachment: "Amended and Restated Memorandum of Understanding By and Between Southern California Association of Governments and San Joaquin Hills Transportation Corridor Agency Regarding Implementation of Toll Facility Pricing Policy," April 5, 2001.

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San Joaquin Hills
Corridor Agency

Chairwoman:
Linda Lindholm
Laguna Niguel



TRANSPORTATION CORRIDOR AGENCIES

Foothill/Eastern
Corridor Agency

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San Clemente

December 2, 2002

President Hal Bernson
C/o Mark Pisano, Executive Director
Southern California Association of Governments
818 Seventh Street, 12th Floor
Los Angeles, CA 90017

Subject: Letter of Understanding regarding the Monitoring Provisions of the "Amended and Restated Memorandum of Understanding By and Between Southern California Association of Governments and Foothill/Eastern Transportation Corridor Agency Regarding Implementation of Toll Facility Pricing Policy"

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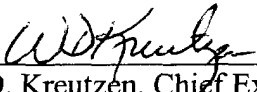
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December 2, 2002
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